



# FOLIO Update & Future Partnerships

FOLIO最新资讯及合作伙伴

**EBSCO**

Mike MacKinnon  
Director - SaaS Innovation  
EBSCO Information Services  
EBSCO SaaS创新服务部总监



# Open Library FOUNDATION



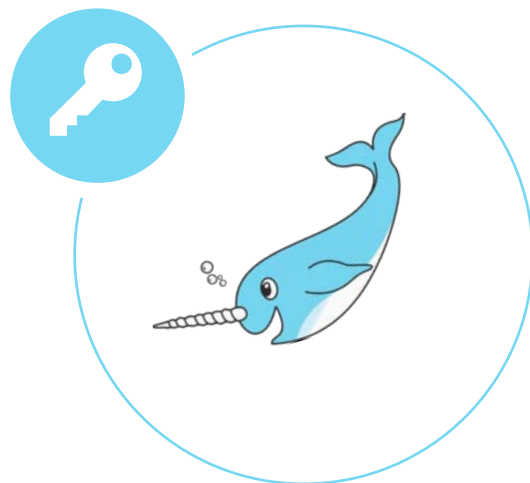
**01** FOLIO



**02** OLE Partnership



**03** GOKb



**04** ReShare



**05** VuFind

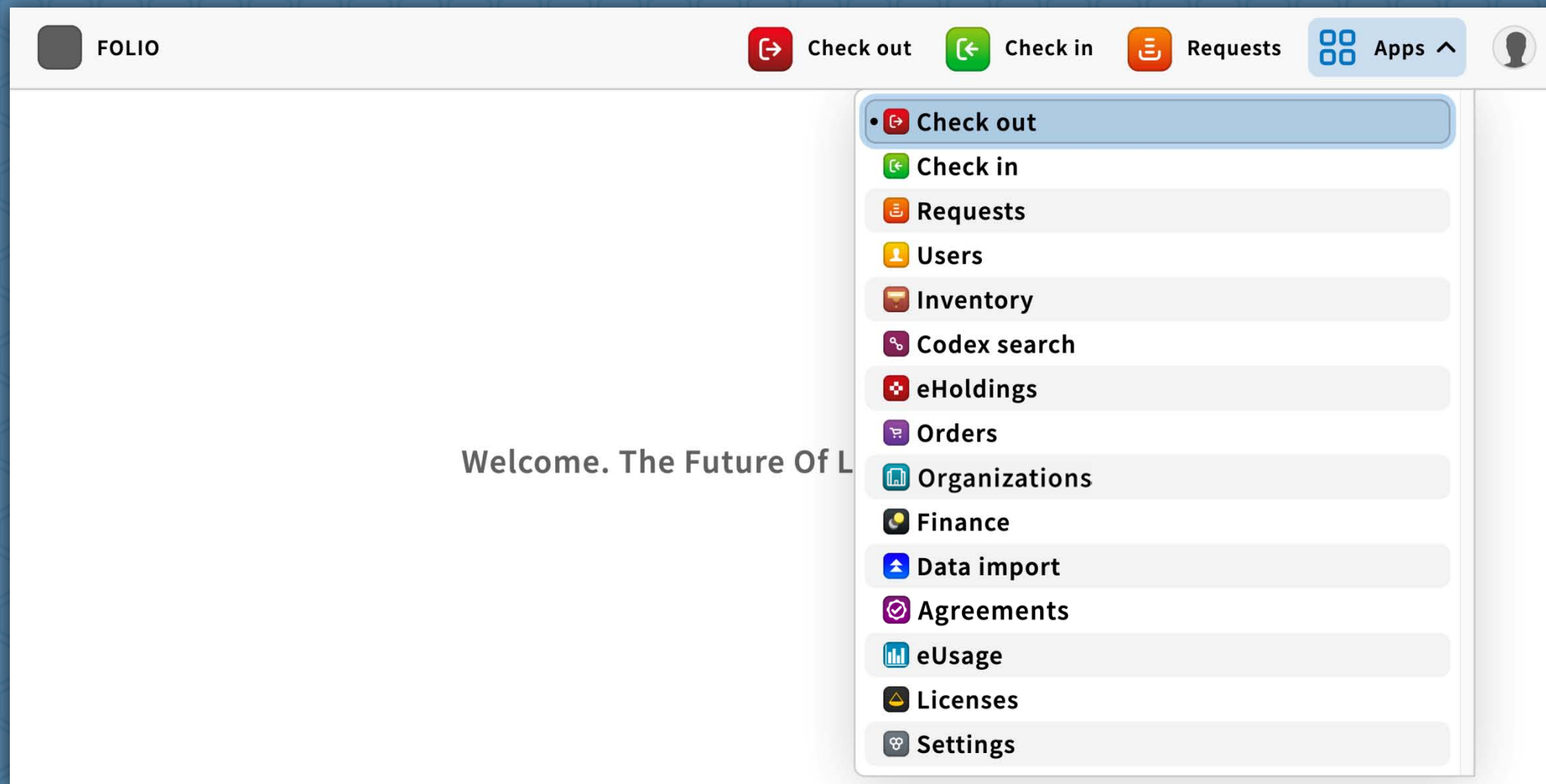


**06** Coral ERM



**FOLIO**

# Fit-to-purpose, re-usable apps



# Fit-to-purpose, re-usable apps



## Agreements

- Objects that describe the relationship between organizations, content / eResources, licenses, and the renewal/purchasing workflow
- Set dates and review status to trigger workflows

# Fit-to-purpose, re-usable apps

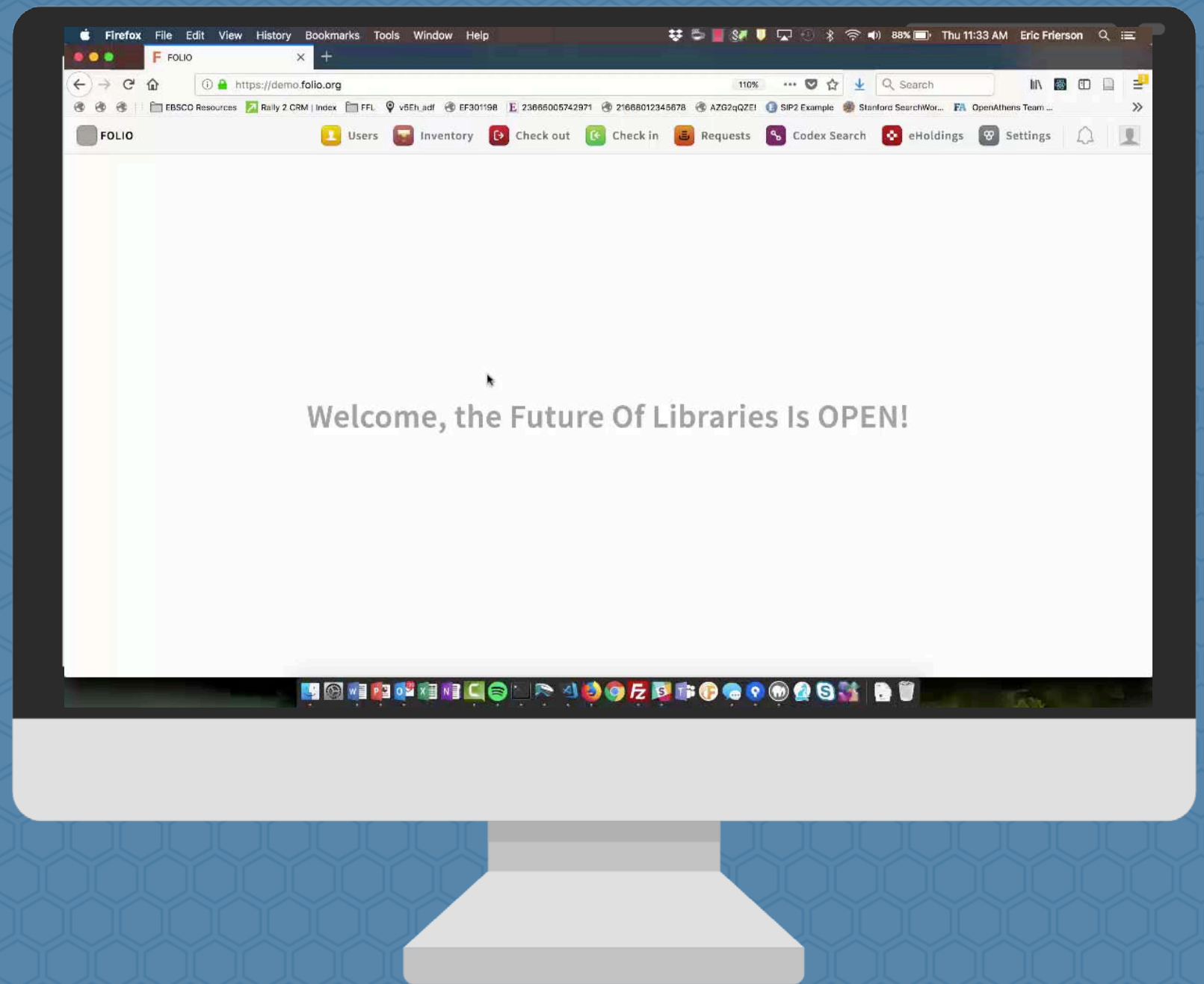


- Harvest and load usage data from aggregators, SUSHI, etc.
- Connect usage to agreements and vendors to understand ROI and resource relationships

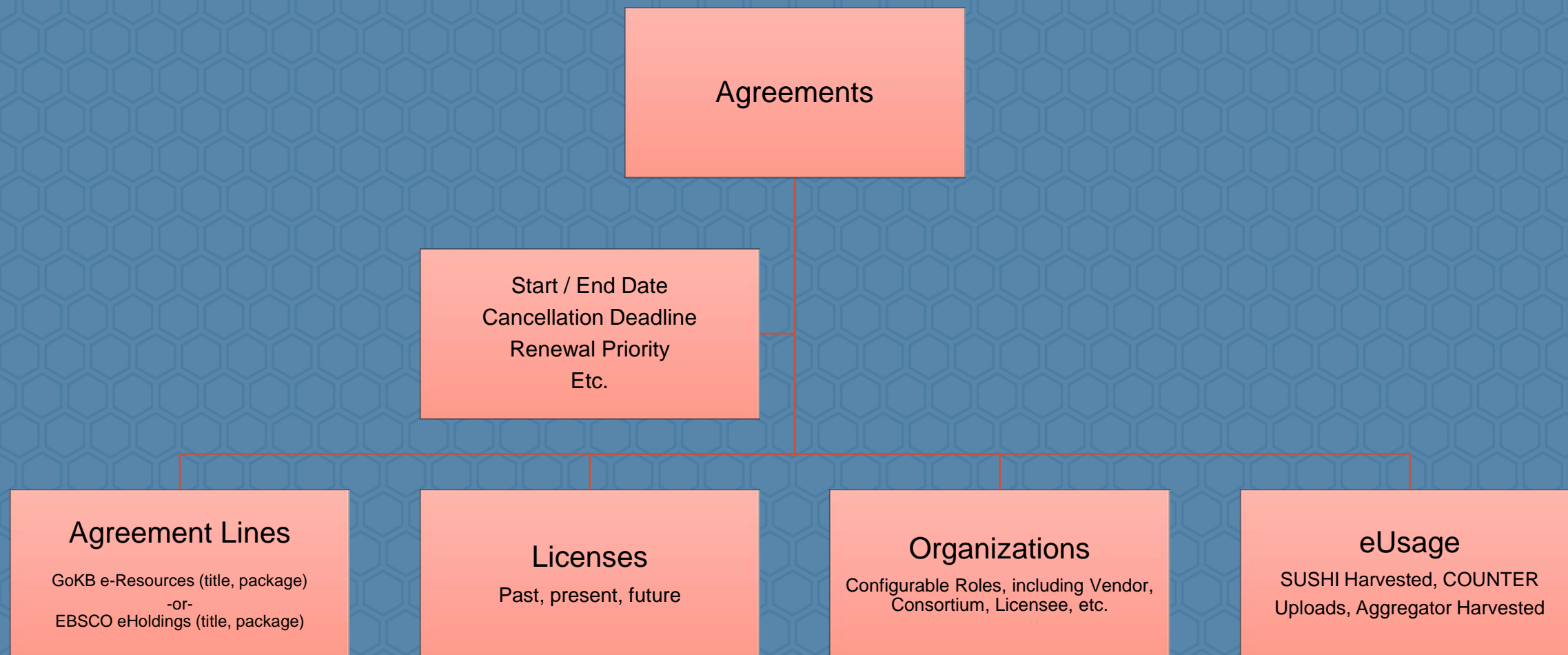


# FOLIO ERM

[Live Demo](#)



# Mental Model starting with Agreements







Search & filter

Search

Search platforms

Reset all filters

Agreement status

Active

Inactive

Unpaid invoice?

Yes

No

Provider Name

Harvesting Status

Latest Statistics

Aggregator

ACM Digital Library

active

2019-02

-

Nature via Nationaler Statistischer

active

2019-02

Nationaler Statistischer

End of list

Richard Redewijk

<https://www.youtube.com/watch?v=oQHde9TYcsM>

30:53

2019-03-27 11:35:57

ERM

Search and filter

Agreements

Showing agreements (184)

+ New

Annual Reviews

Vendor

Content platform

Start date

End date

Annual Reviews

Annual Reviews

01/01/2019

31/12/2019

Expand all

Agreement name

ACM Digital Library

ACS-Zeitschriften

AIP American Institute of Physics

Alexander Street Press

AMS American Meteorological Society

Annual Reviews

APS American Physical Society

APS-Zeitschriften

Beck

Brill

Cambridge University Press

De Gruyter (HSK und e-journals)

Duncker & Humblot

EBSCO

Edinburgh University Press

Elsevier - ScienceDirect

Emerald

Endocrine Press

Gale Cengage Learning

Annual Reviews

Agreement information

License (1)

Finances

Statistics Preview (4)

The eUsage app holds statistics data for this agreement's combination of vendor and content platform: [Open in eUsage app.](#)

Cumulative access per time

Cost per download distribution across agreement

Access distribution across agreement

Reporting period

Start month

End month

09/2017

09/2018

Change

600

500

400

300

200

100

0

1

3

5

7

9

11

13

15

17

19

21

23

25

27

29

31

33

35

37

39

41

43

45

47

49

Percentage of low-level-use titles

9 | [www.folio.org](http://www.folio.org)

folio



# FOLIO Update

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September 2019



# SAVE THE DATE

## **WOLFcon 2020**

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### **January 22 - 24, 2020**

TEXAS A&M UNIVERSITY  
HOTEL & CONFERENCE CENTER  
College Station, Texas

**#WOLFcon 20**





**CHALMERS**  
UNIVERSITY OF TECHNOLOGY

**September 30!!**

查尔姆斯理工大学将于9月30日上线FOLIO

## Already Live With:

- Organizations (For ERM and Orders)
- Agreements
- Licenses
- eHoldings
- Settings

## Going Live September 30:

- Check out
- Check in
- Users
- Requests
- Inventory
- Orders
- Source record storage (for a small subset of their Inventory)





# Schedule of Early Adopters:



## 上线计划:



### **Chalmers University of Tech: September 2019**

查尔姆斯理工大学将于2019年9月上线FOLIO



(displacing existing ILS EoY)



*Fenway Libraries* 芬威图书馆: *May 2020*



*University of Alabama* 阿拉巴马大学: *July 2020*



*Cornell University* 康奈尔大学: *July 2020*



*Lehigh University*: 里海大学 *July 2020*



*Texas A&M*: 德克萨斯A&M大学 *July 2020*



*Shanghai Library* 上海图书馆: *January 2021*



# Open Source Collaborations





# Growth of Open Source to solve problems

## 开源资源的增长协助解决问题

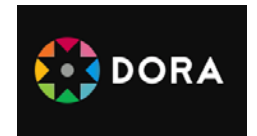
Our industry has seen initiatives emerge in response to these problems

我们已经有了应对这些问题的举措

- Scholarly collaboration networks, discipline and institutional repositories help researchers share work  
学术网络，机构知识库帮助研究人员分享工作
- New platforms enable the creation, sharing and preserving of code and research data  
新平台可以创建，共享和保留代码和研究数据
- Movements such as DORA and the Leiden Manifesto moving beyond journal-based metrics now becoming mainstream and into funder recommendations and mandates 像DORA和Leiden Manifesto革新，已经超越了基于期刊的指标，现已成为主流

<http://www.leidenmanifesto.org/>

<https://sfdora.org/>





# EBSCO Partnerships – FOLIO Potential

## EBSCO 开源合作伙伴



CODE OCEAN

### Code Ocean

Provides a research collaboration platform.

It centralizes where research code and data is created, managed and shared.

提供研究合作平台，集成了创建、管理和共享研究代码和数据。



### Protocols

Provides an open access repository for research methods. It makes it easy to share method details before, during and after publication

为研究方法提供开放存取库，使得共享方法变得更容易。



### Ubiquity

Provides an open source institutional repository. It supports the collection and dissemination of research with the Samvera-based Hyku platform. Ubiquity also provides an open access low cost institutional publishing platform for journals, books and ETDs (essays theses and dissertations...)



arkivum

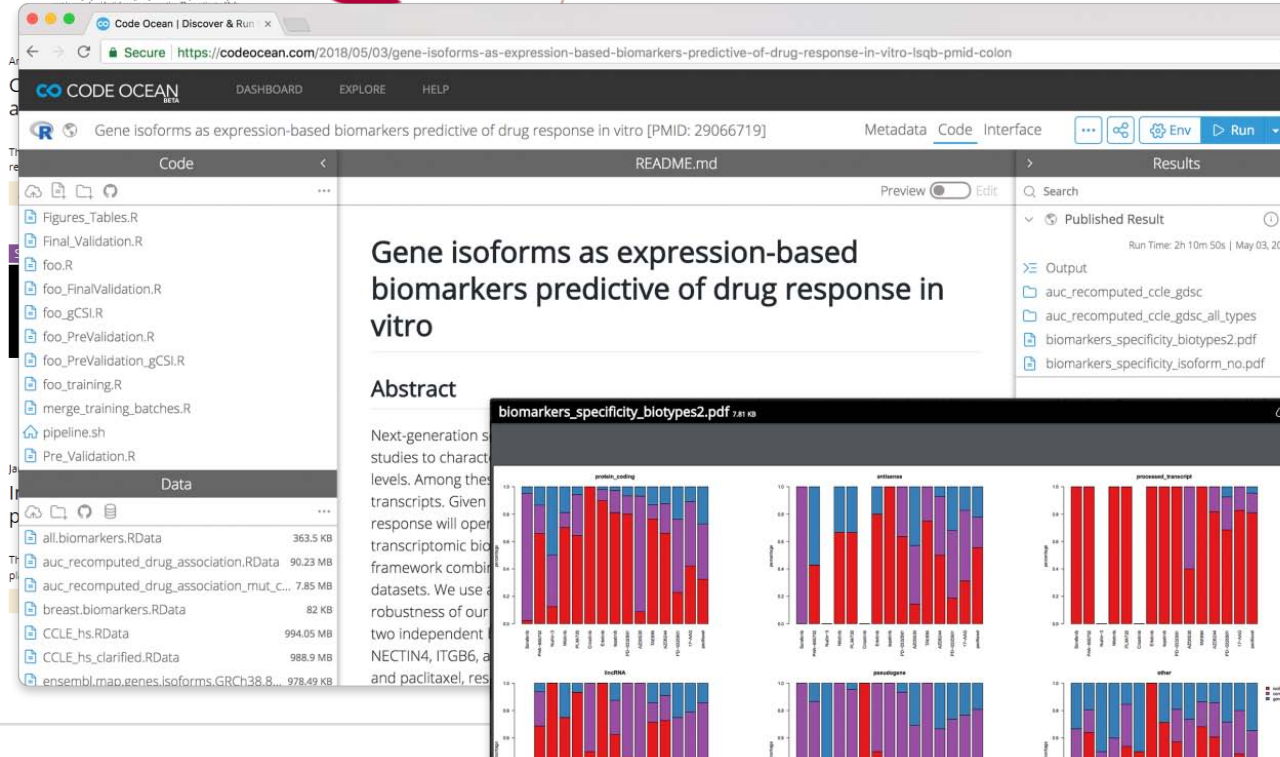
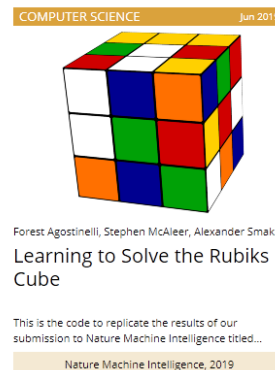
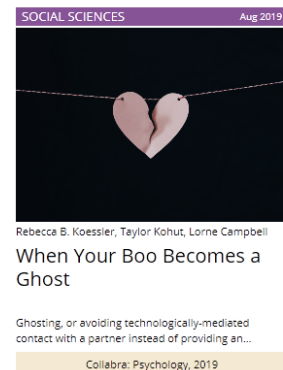
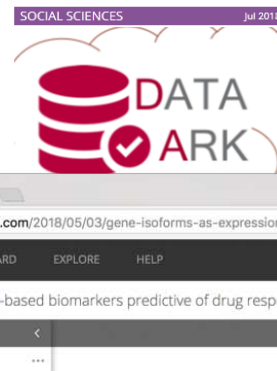
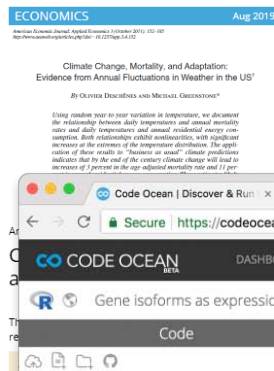
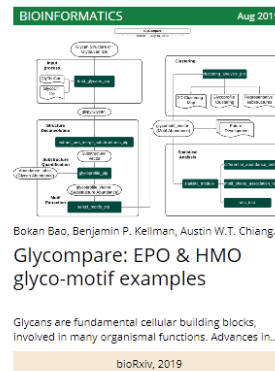
### Arkivum

Provides a platform to collect and archive research output. It supports

archiving, long-term preservation and access with Perpetua. 提供收集和存档研究成果的平台，支持Perpetua的存档、长期保存和访问。



提供研究合作平台，集成了创建、管理和共享研究代码和数据。





Provides an open access repository for research methods. It makes it easy to share method details before, during and after publication.

为研究方法提供开放存取库，使得共享方法变得更容易

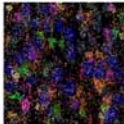
protocols.io

israel

tions Groups Researchers Discussions Reagents Jobs News Events Resources Help

its for israel

SORT BY: Views



osmFISH

simone codeluppi<sup>1</sup>, Lars Borm<sup>1</sup>, amit zeis<sup>2</sup>

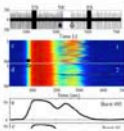
<sup>1</sup>Karolinska Institute Stockholm, <sup>2</sup>Technion - Israel Institute of Technology

Apr 27, 2018 · [dx.doi.org/10.17504/protocols.io.p9kdr4w](https://doi.org/10.17504/protocols.io.p9kdr4w)

Human Cell Atlas Method Development

Borm

1,661 views · 43 steps · 9 bookmarks · 57 comments



Protocols for activity change Norepinephrine

Version 2

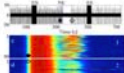
Yasmin Bar El<sup>1</sup>, Sivan Kanner<sup>2</sup>

<sup>1</sup>School of Physics and Astronomy, Tel-Aviv University

Dec 07, 2018 · [dx.doi.org/10.17504/protocols.io.p9kdr4w](https://doi.org/10.17504/protocols.io.p9kdr4w)

Bar El

89 views · 6 steps



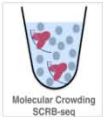
Calcium imaging

Yasmin Bar El<sup>1</sup>

<sup>1</sup>School of Physics and Astronomy, Tel-Aviv University

protocols.io

Researchers / Aleksandar Janjic / Publications / mcSCRB-seq protocol



mcSCRB-seq protocol V.2

Nature Communications

Johannes Bagnoli<sup>1</sup>, Christoph Ziegenhain<sup>1</sup>, Aleksandar Janjic<sup>1</sup>, Lucas Esteban Wange<sup>1</sup>, Beate Vieth<sup>1</sup>, Swati Parekh<sup>1</sup>, Johanna Geuder<sup>1</sup>, Ines Hellmann<sup>1</sup>, Wolfgang Enard<sup>1</sup>

<sup>1</sup>Ludwig-Maximilians-Universität München

May 22, 2018

4 Works for me

[dx.doi.org/10.17504/protocols.io.p9kdr4w](https://doi.org/10.17504/protocols.io.p9kdr4w)

Human Cell Atlas Method Development Community

Aleksandar Janjic

Ludwig-Maximilians-Universität München

Steps Abstract Guidelines Materials Forks Metadata Metrics

BEFORE STARTING

Wipe bench surfaces with RNase Away and keep working environment clean.

Preparation of lysis plates

1 Prepare Lysis Buffer according to the number of plates to be filled.

	A	B	C
1	Reagent	96-well plate	384-well plate
2	NEB HF Phusion buffer (5x)	1.1 µL	4.4 µL
3	Proteinase K (20 mg/mL)	27.5 µL	110 µL
4	UltraPure Water	411.4 µL	1645.6 µL

35 comments

View 33 comments on prior versions of this protocol

Comment or ask a question

MOHAMMAD-MONZOOR AKINWALE Aug 16, 2019 08:55 PM

I need suggestions and directions on what may be denaturing competent DNA specimens during Agarose gel electrophoresis and what to do to protect them from such attack and to make them show under uv transillumination as bands

REPLY

Aleksandar Janjic Aug 19, 2019 06:23 AM

Ludwig-Maximilians-Universität München

We have not encountered such issues before. This is

EBSCO

18 | www.ebsco.com



 CLOUD-HOSTED

 OPEN SOURCE

 NO LOCK-IN

<https://u-repo.io>

Provides an ***open source institutional repository***. It supports the collection and dissemination of research with the Samvera-based Hyku platform.

Ubiquity also provides an ***open access low cost institutional publishing platform*** for journals, books and ETDs (essays theses and dissertations...)

Ubiquity提供开源机构存储库，并支持使用基于Samvera的Hyku平台收集和传播研究成果。

Ubiquity还为期刊、图书和论文提供开放式，低成本的机构出版平台。





arkivum

Bringing archived data to life

Arkivum

## Our partner philosophy

Our partnerships are important to us as we recognise the value of working with like-minded businesses to provide an enhanced customer experience to our shared clients. This includes Go-to-market partners, so we can be where our clients expect us to be, and technology partners, so our software integrates effortlessly within customers' existing IT estates. If you are interested in becoming an Arkivum partner, please email us at [partners@arkivum.com](mailto:partners@arkivum.com)

[Become a partner](#)

## Go to Market partners

Our GTM partners help us to better support communities and industries across the globe.



cristiedata  
an iomart company

PHLEXGLOBAL  
RAISE YOUR STANDARD

ThermoFisher  
SCIENTIFIC

ukcloud

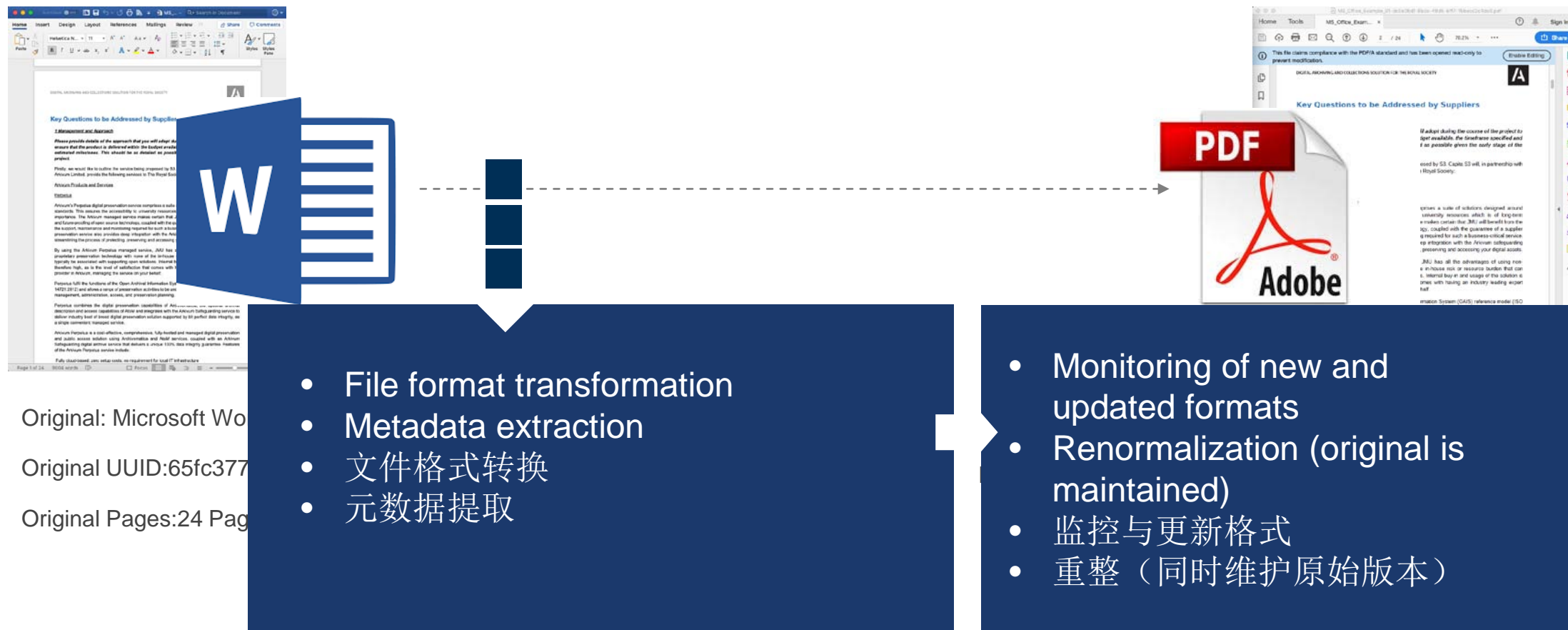
EBSCO

TeleMessage

ANGLW



# What does preservation look like?





# Material types

资源类型

## Research output and documents

Journal articles 期刊文章  
Preprints 再版资源  
Technical report and working paper series 技术报告  
Theses/dissertations 论文  
Research memos 研究备忘录  
Research data 研究数据  
Book chapters 图书章节  
Archived course materials 存档的课程资料  
Protocols & methods 协议和方法  
Code 代码

## Digital assets

Maps 地图  
Posters 海报  
Books 书籍  
Historical texts 历史文本  
A/V materials 视频  
3-D objects 3D数据  
Newspapers 报纸  
Finding aids 检索工具  
Institute publications 机构出版物  
Collections of institutional memory 机构收藏  
Faculty archives 学院档案  
Donated collections 捐赠资源



# Preservation & Safeguarding 保存与保障



File format  
normalization



ESCROW



Migration paths



Multiple copies



Automatic  
metadata  
capture



Fixity checking  
&  
virus scans



Search platform

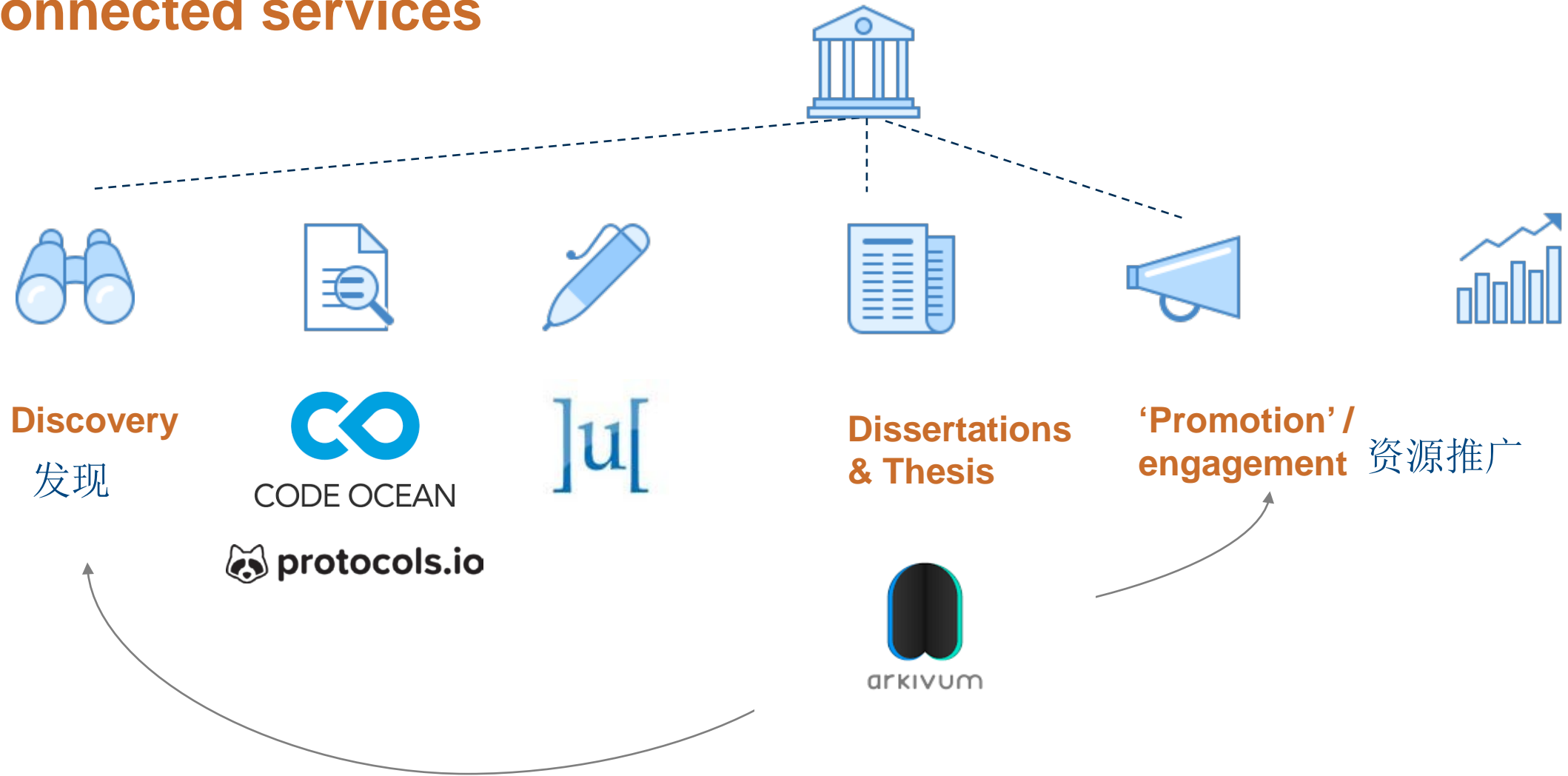


Data under  
management



# Research activities

## Connected services



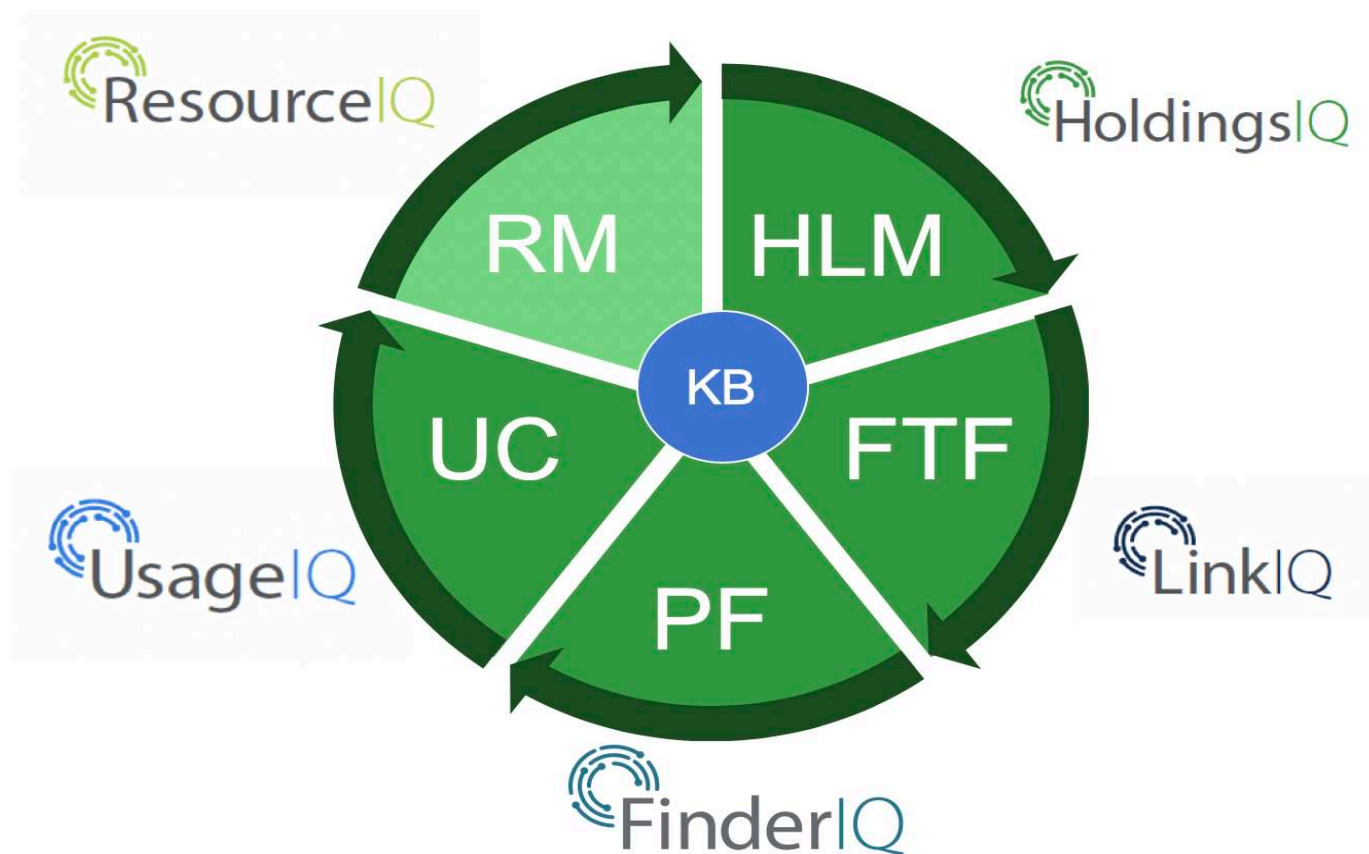
<https://101innovations.wordpress.com/survey-results/research-activities/>



# FOLIO ERM Ready - Today

# EBSCO KNOWLEDGE SERVICES


## EBSCO知识服务体系






# EBSCO Knowledge Services Release Schedule


## EBSCO知识服务产品上线时间

 **INTERACTIVE KNOWLEDGE SERVICES DOCUMENTATION**


Browse our live documentation using a Swagger explorer below. The interactive sandboxes below enable you to try the requests. Learn more about the operations, parameters and response details.

 **HoldingsIQ**

The HoldingsIQ service allows EBSCO Knowledge Base data, holdings data and Holdings and Link Management (HLM) services to be integrated with other systems. The service retrieves vendor, package and title related information in JSON format. The information includes customer resources from EPKB.

 **ResourceIQ**

The ResourceIQ service provides the ability to manage platform contacts, license data, administrative access details and include links to external documents. Data added using ResourceIQ can also be assigned to holdings resources managed in HLM or by HoldingsIQ.

 **LinkIQ**

The LinkIQ service enables libraries and partners to customize key functions of the EBSCO open Link Resolver to get their patrons easy access to the content the library makes available. Using LinkIQ, libraries and partners can take advantage of EBSCO's extensive centralized Knowledge Base and deep experience in open linking to power external applications.


**Available Now**

<https://developer.ebsco.com/docs>



End of  
Oct 2019

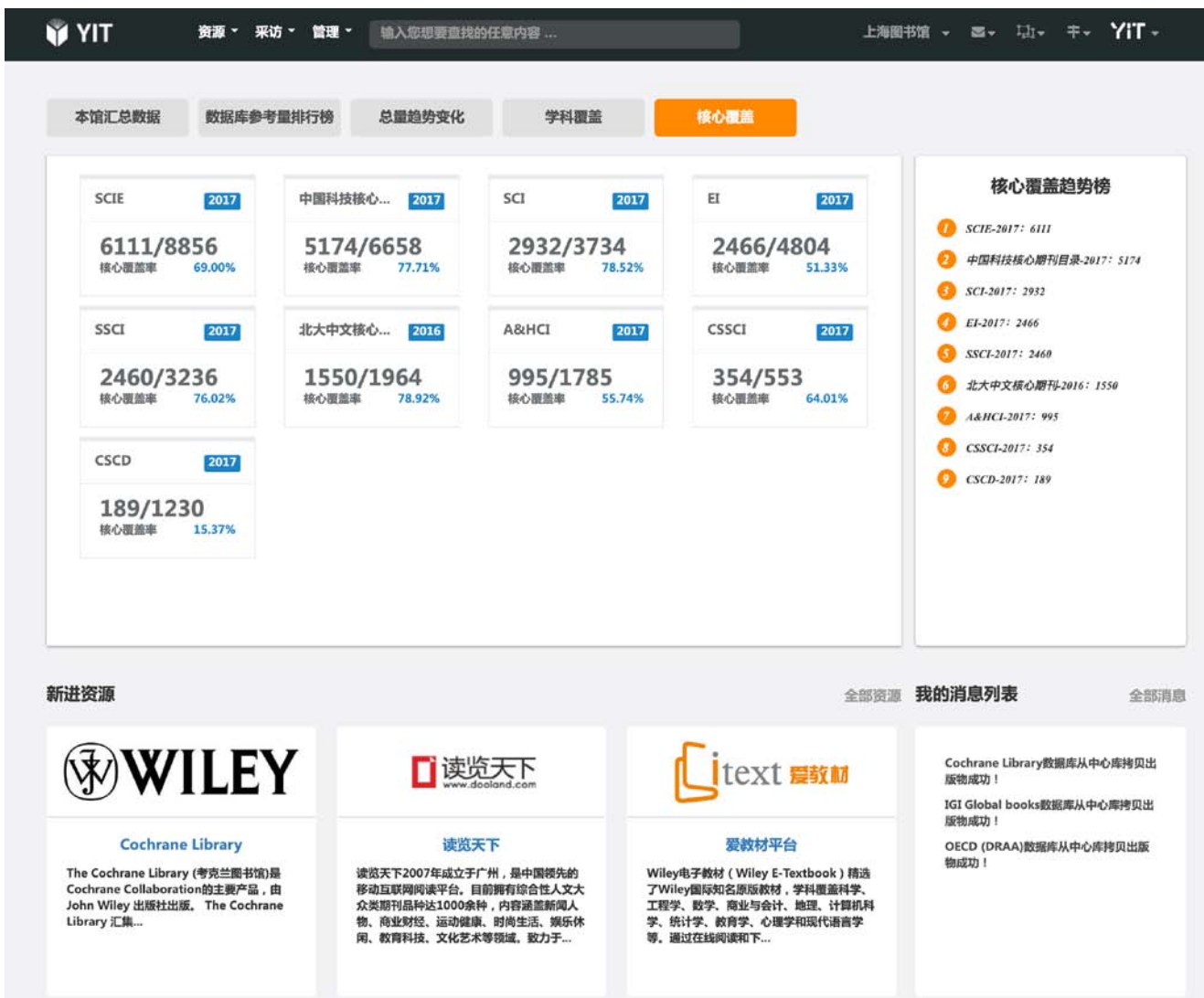
**Search and display for publications  
that are part of library holdings**



Q1 2020

**Deeply embed usage data  
to enhance decision making**

# ERM—电子资源管理系统

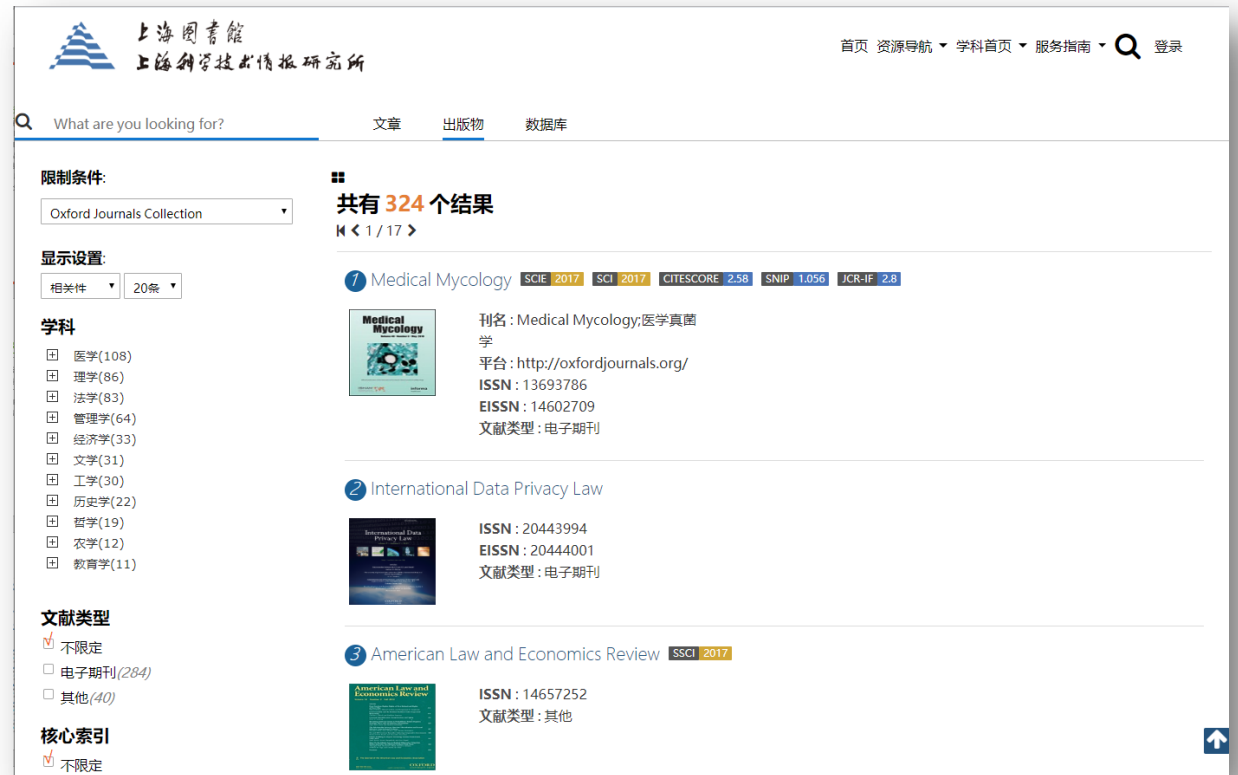


- 元数据管理
- Metadata Management
- 电子资源生命周期管理
- Electronic Resource Life Cycle Management
- 资源统计分析
- Statistics Analysis

# eResource Navigation-资源导航



Database Navigation  
数据库导航



Publication Navigation  
出版物导航



Thanks!

**EBSCO**

Mike MacKinnon  
Director - SaaS Innovation  
EBSCO Information Services